

ABSTRACT OF THE INVENTION

A system and methods for aggregating data contained in multiple client accounts and reporting the aggregated account information to the client as well as to other interested parties to whom the client has granted access permission. Account information may be obtained from external sources using a network and included in the aggregated client data. In an exemplary embodiment, the system includes a web server for generating aggregated account data reports from account information maintained in a database and a client terminal for receiving aggregated account data reports. The system and methods include aggregating one or more sets of stock options in the aggregated account information.

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